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ABSTRACT

This report describes research on the portfolio process that the Oceanside (California) Unified School District uses to identify and plan instruction for students in the Gifted and Talented Education (GATE) program. The report is based on interviews conducted with educators in two elementary schools that participated in the GATE curriculum, instruction, and assessment training and that developed Individual Learning Plans (ILPs) after the portfolio identification process. Information is provided on: the research rationale and plan; the GATE programs and rationale for portfolio assessment; and research findings, implications, and recommendations. In addition to describing the portfolio development process and ILPs, information is presented on characteristics of students who are identified as gifted, problems with and revisions to the portfolio process, variations in ILP format and process, benefits of ILPs, refinements for ILPs, how portfolios and ILPs affect instruction for all students, and use of portfolios as assessment tools in the regular classroom. Consideration is given to implications regarding equity and fairness in identifying GATE students, involving parents and students in the process, the systemic nature of reform efforts, and the need for collaboration within and beyond the district. Appendixes provide the interview protocol and sample ILPs. (SW)

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Oceanside GATE Portfolio Project

A Report Prepared for the California Assessment Collaborative

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Far West Laboratory for Educational Research and Development
730 Harrison Street, San Francisco, CA 94107-1242 (415) 565-3000

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Oceanside GATE Portfolio Project

A Report Prepared for the California Assessment Collaborative

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Oceanside GATE Portfolio Project

A Report Prepared for the California Assessment Collaborative

By

Andrea Whittaker, Ph.D.

Far West Laboratory

with

Bruce Montgomery

Oceanside Unified School District

AUGUST 1994

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Preface

Funded through California Assembly Bill 40 in 1991, the California Assessment Collaborative (CAC) supports 29 alternative assessment pilot projects in two consortia of school districts (San Diego County and City schools in southern California and the Greater ACE Consortium in the San Francisco Bay Area). These pilots implement local assessments, as well as applications of state or national initiatives. Taken together, the pilots cover a wide range of subject matter areas and address diverse student populations (e.g., second language learners, gifted and talented, special education, and Chapter 1 students) with a variety of assessment technologies. These include portfolios, curriculum-embedded and on-demand performance tasks, open-ended items, and student observations.

The CAC goals include providing technical assistance to pilot projects, researching the processes of assessment development, and disseminating findings and assessment strategies throughout California. Far West Laboratory for Educational Research and Development (FWL) serves as the research partner and assists with technical assistance to individual pilots on an as needed basis, and to pilot leaders and other interested groups through a seminar series on aspects of assessment development (e.g., scoring, rubric design, and issues of equity and access).

In working with these pilots over the last two and a half years, the CAC has developed a conceptual model that maps the complex practices and policies necessary for developing "instructionally sound" assessment systems. The interrelated dimensions of the model include: articulating content standards, designing meaningful and fair assessments, building teacher and student capacity to use assessment to improve teaching and learning, and monitoring the consequences of assessments (Jamentz, 1993).

FWL continues to conduct research to gather support for the conceptual model and to interpret the work of the pilot projects against the model's dimensions. This report describes research conducted with the Oceanside Unified School District, which has developed a portfolio used to identify and plan instruction for students in the Gifted and Talented Education (GATE) program.

The author would like to acknowledge and express appreciation to the teachers and administrators of the Oceanside Unified School District for their cooperation in this research and their insight into their project's challenges and successes. In addition, I want to thank Kate Jamentz and Stanley Rabinowitz for their input, and Cynthia Christy and Judy Wong for editing, formatting and other manuscript preparation

tasks. Finally, Charles Carroll is thanked for his expert interview transcriptions and thoughtful comments.

Additional ongoing research by FWL includes investigations of:

A) teachers' involvement in developing, field testing, and scoring a district developed assessment tool and it impact on curriculum and instruction;

B) how a school moves from a handful of individual teachers dabbling in alternative assessment strategies to full school implementation of a new assessment system.

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Oceanside GATE Portfolio Project

A Report Prepared for the California Assessment Collaborative

I. Introduction

Shonna is a real leader. She's going to be president. I told her I would vote for her. She's unbelievable. A great kid. We have this videotape of her leading a group. It was just a prime example of her leadership ability. It was unbelievable to watch this tape, how she was head of a committee and nobody would do anything without looking at her. Last year, she put on a Polynesian Day with the help of the teacher and her mother. It definitely affected what was happening in the classroom for everyone. They did a whole bunch of things to lead up to it, but it culminated in this lovely day where she even got boys into grass skirts. I couldn't believe it, doing Polynesian dancing in the fourth grade. Now that's a leader.

It was the first day of school and I asked my kids to ask me any questions they liked. They asked little kid questions like, "How old are you?" "How tall are you?" "How much do you weigh?" "Are you married?" "Do you have kids?" Riley asked me, "What is your favorite element?" And I looked at him. I didn't know if he knew what he was talking about. So I said, "What do you mean?" He said, "You know on the periodic chart, what is your favorite element?" I didn't want to overwhelm the kid, he's a little third grader. So I said to Riley, "I think I would have to choose oxygen because you need it to breathe. What's your favorite?" He tells me, "Uranium." You know I just went, this is a kid that has something special. He knows what he is talking about. I started watching Riley for these brilliant little statements he would make in class when we were talking about things. He's kind of an eccentric little guy. He thinks in a completely different area than the rest of the kids. In every class discussion it was always interesting to see what Riley's comment was going to be because it was not related to anything the other kids said.

These two portraits capture the exceptional leadership and intellectual talent of two students currently participating in the Oceanside Unified School District's programs for gifted youngsters. Along with dozens of other students with a variety of talents, they have been participating in a unique portfolio process that assesses their strengths and develops a plan for ongoing instruction. Together with teachers

and parents, students discuss their academic, intellectual, and performing talents and devise a plan for a variety of opportunities and experiences that are carried out with support from home and school.

This report describes research on the portfolio process in the Oceanside Unified School District conducted as part of the California Assessment Collaborative (CAC), and carried out by Far West Laboratory for Educational Research and Development (FWL) with full support from the Oceanside staff. The report contains the following sections:

- Research Rationale and Plan;
- Overview of Oceanside's GATE Programs and Rationale for Portfolio Assessment;
- Findings;
- Implications and Recommendations.

II. Research Rationale and Plan

Since 1991, FWL in partnership with the CAC has researched local assessment development efforts, their impact on school structures, and strategies for building teacher and student capacity to use assessment as a tool for teaching and learning. The early stages of this research focused on the process of alternative assessment development across all participating CAC pilots and culminated in the CAC's first phase report, *Charting the Course Toward Instructionally Sound Assessment* (Jamentz, 1993). Following this report which provided a conceptual map of the processes and strategies necessary for developing and implementing "instructionally sound assessment systems," FWL's research focus narrowed to examine pilot specific development efforts.

Research on Oceanside's GATE portfolio project was intended to describe its development processes and examine the effectiveness of the project at meeting its goals. The major purposes of the research are to inform Oceanside's future project refinements and to further inform CAC's conceptual model for instructionally sound assessment systems.

Research Question

The major research question of this study is as follows:

> **How does the CAC supported GATE portfolio identification process and subsequent development of Individual Learning Plans (ILPs) inform instruction for GATE students in Oceanside?**

This overarching question was examined in the context of three related categories of issues:

- Portfolio development;
- Individual Learning Plans development;
- Links among portfolios, Individual Learning Plans and teachers' instructional planning.

Within these categories, we investigated the new processes and strategies and how they vary across participating schools, ongoing refinements and revisions, and how the new procedures compared to traditional practices. In addition, we examined the efficacy of applying processes and strategies developed in the GATE program to all students in the Oceanside district.

Data Collection Procedures

Interviews and artifact collection were the primary methods of research for this project, but several other activities supplied important information related to Oceanside's project goals, processes, and effects. Prior to the interviews, FWL staff attended a district-wide portfolio screening meeting (a culminating activity of the identification process) and several ILPs development meetings with the school site committee members, parents, teachers, and students at one school site. Quotes from interviews, meetings, and informal conversations are found throughout this report.

Interview Sampling

In its first few years of operation, the Oceanside GATE project has grown to include most of the 15 elementary schools in the district. District personnel estimate that about 10 of the 15 schools have actively participated in GATE curriculum, instruction, and assessment training and are using the portfolio identification process. And, about six are using ILPs as follow-up to identification. Of these six, two schools (Mission and Reynolds) with the most training, and perceived by the district as furthest along in implementation, were chosen to participate in the research. District personnel have described both schools as committed to the GATE assessment process and having key leadership necessary for implementation. In addition to their level of participation, Mission and Reynolds were selected because they represent very different school populations. Portraits of the two schools are presented below.

Mission

Mission Elementary School is located in a busy commercial district of Oceanside with primarily multi-family housing units or other rental properties. The 731 children at the school are from a variety of backgrounds and language groups (85% minority, predominantly Hispanic at 58%). Mission provides bilingual programs and primary language instruction for 255 of its students and 32% are classified as limited-English proficient (LEP). The school also has a fully funded Chapter 1 reading program that serves 448 students (61%).

Mission shares a campus with the district's special education program for severely physically challenged and mild to moderately intellectually challenged youngsters. This special education program for severely handicapped students and other special day class and resource programs serve 118 students (16%). The school has a commitment to mainstreaming and inclusion, and individual classrooms contain the full diversity of students.

> ***We are doing a lot of inclusion here. We have merged two campuses, a separate special school for severely handicapped and multiple handicapped kids. And in my classroom,***

we are trying some inclusion models with severely handicapped kids and mainstream kids. I have resource specialist program kids and I have special day class kids with mild to severe learning disabilities in the room. Also along with GATE, and in the past, I have had bilingual kids.

Also, at this site we have a seventy-five percent student turnover rate. So a lot of these kids are dangling. Very few start in kindergarten and finish the sixth grade here. So even to look at things over the long view here on campus is kind of tough to do sometimes.

Led by the school's site-based coordinator (SBC) for special programs, Mission has been involved with the GATE portfolio project from its inception. Along with the SBC, two teachers have been involved in extensive training with the district GATE consultant. Two representatives from the school participate in the district-wide GATE task force. The school psychologist who serves Mission has also played an ongoing role with the task force and at the school. Though Mission identifies relatively few GATE students, the staff has been viewed as pioneers in the district. The ILP was "invented" by the team at Mission as part of a follow up to an initial round of identifications. The principal has also been an active player in supporting the implementation of GATE assessment strategies.

Three individuals from Mission participated in the interviews for this research. These included the site-based coordinator, a sixth grade teacher, and a primary grades bilingual teacher.

Reynolds

Reynolds Elementary School, one of the newest schools in the district, is located in a new housing development near the back gate of a Marine Corps base. The school has a sprawling campus that serves about 900 students. The suburban school has very few LEP (3%) students and is composed of 45% minority populations (predominantly African-American and Hispanic). Reynolds provides Chapter 1 reading programs to 180 targeted students, but since the school is not fully funded for Chapter 1, additional students who may be eligible go unserved.

Like Mission, Reynolds has had representation on the GATE task force from the beginning of the project. The school psychologist who serves Reynolds and the SBC (at the time a classroom teacher) have participated in the district task force. Two key teachers at the school have been involved in training with the district GATE consultant and they have provided similar training for their colleagues on site.

Interviews were conducted with the SBC and the two teachers (grade six and grade three) mentioned above. ILPs development meetings attended by the FWL researcher occurred at Reynolds. Both schools were represented at the district screening meeting attended by FWL. In addition to participants from these two case schools, the district administrator who acts as project director was also interviewed. This interview provided information on the district's vision and policy for the GATE program, and student identification and ILPs development processes.

Interview Procedures

The interviews with each participant were carried out by the same FWL researcher in early 1994. Each individual interview lasted from 45 to 75 minutes and was audio taped for later transcription. Interviews with school personnel were conducted on school sites, in the site-based coordinator's office or some other quiet space. The interview with the district administrator was conducted in a restaurant.

The interview questions which match the three sets of research issues noted above were open-ended and interrelated. Often the interviewee's responses to an opening question supplied information for later questions. The researcher monitored the interviews carefully to insure that all topics were addressed but was flexible in the sequence of questions to create an atmosphere of discussion and conversation rather than a forced question/response format. A copy of the interview protocol is included in Appendix A.

Artifacts Collection

Prior to the interview, school personnel were asked to bring GATE portfolios containing student work samples, ILPs, and other artifacts to be used to spur conversation and provide concrete examples during the interview. At the close of each interview, the researcher recorded a list of artifacts shared and later requested copies of these materials.

Names have been removed from artifacts to protect student, parent and teacher privacy and individuals referred to in quotes have been renamed to assure confidentiality.

In addition to the materials referenced during the interviews, three other sources provided artifacts. The researcher's notes from ILPs and district identification screening meetings captured the process of each of these events and commentary or questions about how they might be refined in the future. The district project director supplied a brief report which included background information on the project, identification process, and statistics on students identified using traditional and portfolio methods. And finally, ILPs for students identified at Mission and Reynolds and from a third school (Ivey Ranch) were collected. Though involved in training and portfolio use for less time than the other schools, Ivey Ranch has made a similar commitment to ILPs development and use. Therefore, this school was asked to

submit ILPs to provide an additional perspective on 1) ILPs formats developed across schools within the district, 2) types of exceptionalities highlighted in the identification process, and 3) variety in instructional opportunities prescribed in ILPs.

Analyses/Approaches to Data Reduction

Each interview tape was transcribed verbatim and examined for differences and similarities in processes described by each participant (within and across schools) and for major themes, issues, or challenges tied to the research questions.

Collected artifacts were sorted and catalogued according to the type of information provided. The ILPs collected from the three schools were reviewed and several tables were constructed to summarize the students' exceptionalities highlighted during identification and the corresponding instructional opportunities prescribed.

III. Overview of Oceanside's GATE Programs and Rationale for Portfolio Assessment

In order to fully understand the context for the research findings and recommendations which are presented in sections III and IV of this report, we first present a brief overview of Oceanside's GATE program and the rationale for choosing a portfolio approach to the selection of students for the GATE program.

In response to statewide and district concerns, the Oceanside Unified School District established a task force in 1989 to initiate a process to meet the needs of all gifted and talented students. In 1990, the Board of Education adopted a philosophy statement intending to identify and serve both traditional and underrepresented gifted and talented students. Since that time, the task force has updated the philosophy statement to broaden the definition of giftedness. It now includes fine arts and performing arts, and has engaged educators across the district in professional development seminars and workshops designed to increase awareness and promote links between gifted programs, instruction, and assessment. The district has also instituted a portfolio process for identifying gifted students and designing differentiated instruction for those identified.

Program Philosophy

Led by consultant Elinor Smith, the professional development seminars have engaged teams of teachers from all district schools (K-12) in discussions of GATE program and instruction and assessment strategies. About 10 school teams (primarily K-6) have participated in ongoing sessions to institute "differentiated curricula" for gifted students at their schools.

Traditional programs for gifted students often provided enrichment activities that went beyond skills-based curricula; taught higher order thinking, problem solving or learning strategies in isolation; required gifted students to do more of the same curriculum (e.g., 15 book reports instead of 10); or accelerated programs of routine skills-based curricula (e.g., sixth grade math for fourth grade gifted students). This type of curriculum was viewed by many as different and therefore better than what "regular" students received, but typically prescribed a single enriched or accelerated curriculum regardless of the individual child's talents, interests, or abilities.

Recently, the California Department of Education (CDE) and the California Association for the Gifted have promoted "differentiating the core curriculum" as an alternative to traditional programs. With recent adoptions of new state frameworks, the core curriculum suggests a shift away from the skills-based programs to meaning-centered instruction that emphasizes complex ideas, thinking, and problem solving

in content-rich curriculum for all students. Often referred to as the "thinking curriculum", the new state frameworks and curriculum guides encourage extending and elaborating the content of language arts, mathematics, science, and social science so that each student can build knowledge and strategies appropriate to his/her current level.

> ***After working with our consultant, we have a group of teachers who are working on differentiating the curriculum for our GATE students, as well as for ALL of our students. This is something that is evolving this year and will be more in practice next year. But what they are doing is, the grade levels are focusing on particular themes. For instance, the second grade has chosen the general theme of change, and the sixth grade has chosen the theme of choices. The second grade is a little farther along. They have looked at their core curriculum for the year and organized it so that it will fall under the umbrella of the theme of change. They can make generalizations that fit in with their curriculum during the year.***

Teachers provide appropriate instruction, scaffolding, and support so that the core curriculum is "differentiated" for students with different needs. For the gifted student this means taking the open-ended, content-rich core curriculum as far as he/she can on his/her own using background experiences, abilities, and interests. Or, by the teacher specifically designing experiences for students that allow for variations in acceleration, depth, complexity, or degree of novelty.

> ***I was at a meeting yesterday with Elinor Smith about doing thematic instruction on interdisciplinary themes. In the curriculum that you plan there would be automatic extensions for gifted learners. It would come out of the curriculum, rather than out of this plan. As that becomes more and more a part of my teaching, I will be able to take my theme for the year and my objectives for the year. We are trying to do the theme, a different theme, on each grade level and work departmentalized teaching.***

> ***At this time, the GATE Program is more or less the core curriculum for all students, with the identified GATE students having a differentiated curriculum. What we mean, is that we look at their curriculum in more depth. Maybe extend it a little bit more. Then the other students in the classroom, if they are capable and able to, take it farther and farther. There is no pull out program. It's within the core curriculum in the classroom.***

Alternative Assessment Strategy for Identification

The philosophy that all students should be engaged in a thinking, meaning-centered curriculum has required a shift in assessment strategies to capture student learning beyond the rote skills that are easily evaluated through multiple choice tests (Jamentz, 1993; Wiggins, 1991). In line with Oceanside's redefinition of giftedness and the movement toward differentiated curriculum for all students, assessments used to identify gifted and talented youngsters have changed accordingly.

The process for identifying students for gifted programs traditionally has relied on group or individually administered intelligence and achievement tests. These assessments have been perceived as biased against some ethnic or socioeconomic groups and English language learners and are not valid assessments of every talent or exceptionality (i.e., leadership, musical or artistic talent). After examining which students were identified using these standardized measures, Oceanside discovered that students from some backgrounds (ethnic and language groups) were underrepresented in the GATE program. Therefore, the Oceanside Unified School District began to experiment with alternative assessment strategies for identifying students for GATE programs.

> ***The reason that we have gone to the portfolio process is, we discovered that a large portion of our GATE kids were all one ethnic group. When we looked at our population, ethnicity and the proportion statistically of these minority kids, they weren't being represented in our GATE population. We began to say, "why?" I think that's when this all started about four years ago. We looked and we said, "Is it the standardized testing? You know, the scores from these kinds of tests that are keeping these minority kids from showing that they, yes indeed do belong in a GATE program." So it was at that time, I think, that we started looking at getting performance assessment, performance based. Looking at products that the kids do, to help these kids that don't do well on these standardized tests. When you now look at the statistics, it's more of a broad sample of different cultures and ethnicities.***

A portfolio assessment strategy was adopted because it:

- provided teachers with an alternative method for capturing evidence of exceptionality in a classroom setting;
- allowed input from parents through anecdotal descriptions of student's early (preschool) achievement and home activities;
- provided an ongoing documentation of potential talent and capacity rather than a static picture of single exceptional performance.

IV. Findings

The findings are organized around three sets of issues which are linked to the research question described in section II. The first set addresses issues related to the portfolio development process used to identify students for the GATE program. Second, we examine ILPs development. Finally, we describe how the two assessment tools (portfolio & ILPs) are linked to the instructional programs for gifted and other students in Oceanside. In each case, the benefits and challenges to the process are noted, as well as similarities and differences in implementation between the two case schools. Quotes from interviews and artifacts are included to elaborate the findings.

Part I -- The Portfolio Development Process for GATE Identification

The findings in this section are organized around the following topics: (1) identification process; (2) who gets identified; (3) challenges to the identification process; and (4) refinements and revisions over time.

Identification Process

A report prepared by district personnel describes the GATE identification process within four stages (Montgomery, 1993 pg. 8-9):

- Awareness
- Assessment
- Preliminary Identification
- Final Identification

A summary of each step and quotes from interviewees describing their experiences with students are presented below.

Awareness. At the first stage, teachers and school recognize that the needs of a particular student are not being met without differentiating the curriculum. This awareness may come about through a formal class-wide screening, a specific referral by a parent or previous teacher, or former district notification. At this time, the student's classroom teacher may complete a prescreening or referral form and seeks out the site based coordinator of special programs or the school psychologist to acquire a portfolio. The teacher completes the first part of the portfolio which asks for student demographic information.

> ***At the end of the school year, teachers will identify any students that they think might be potential GATE for the next year. Starting in September or around October, November teachers are asked to submit the list. Then the site-based coordinator gives the teachers a***

portfolio. A GATE committee is at school to help if anyone needs assistance in developing or answering questions. The committee sort of guides them through it if they aren't comfortable with it. Then the teachers start building a portfolio.

Assessment. During the next stage, the student's teacher, parents, and other school staff begin to conduct "inquiry or investigation to discover and document exceptional potential or abilities" (Montgomery, 1993, pg. 9). Primarily teacher-driven, the portfolio inquiry is conducted to gather and annotate a variety of sources of exceptionality, to describe exceptional characteristics identified, and to consider and document social/environmental variables that may influence the student's opportunities to succeed. Teachers and the site team complete a student profile form and a second form on social and environmental variables, while the students and parents fill out an additional information form.

I start planning a strategy as to how I can prove my case to the board. I think of myself as a lawyer. I have this case that I'm trying to present. How do I prove that this child is gifted in a court of law? How would I do that? I start gathering as much information as I can. If the child says something exceptional, I'll run to my desk and write it down. If there is something demonstrated through written work, I'll xerox it and save it. It may take a couple of weeks. It may take a year for a teacher to prove the child they feel is gifted, is gifted. If they are able to prove it, if they feel that they've got enough information to present to the school site board, they put together the portfolio. They also get with the parents. It's real important to let the parents know what you're doing. What we've done is we've xeroxed the front two pages of the portfolio and asked the parents to highlight, or fill in any type of experiences they've had with the child at home. Anything that could help us prove our case.

Preliminary Identification. At the preliminary stage, the teacher and a school site committee made up of teaching colleagues, the school psychologist, and the site based coordinator "formally examine the portfolio evidence, make recommendations about identification and redirect inquiry if necessary" (Montgomery, 1993, pg. 9). The teacher presents the portfolio to the group who insures that the portfolio is accurate, complete, and concise prior to forwarding the portfolio to the district final identification screening meeting. A selection committee summary form accompanies the portfolio to the district screening meeting.

We have screenings twice a year at the school. We have our site GATE screening team which includes a psychologist, a principal, the site-based coordinator and teachers. We

get a roving substitute and the teachers bring the portfolio to us. We decide yes, no, or maybe on the portfolios. If it's yes, we then take them to the district screening committee. No means no. If it's maybe, it's maybe for various reasons. Maybe usually means the teacher has not collected enough evidence. What should come out of this is the fact that we are not looking for a bulk of evidence. We are looking for good, solid evidence.

Final Identification. At the district screening meeting, the district program director and representatives from each school submitting portfolios review and discuss each student's portfolio. Individuals at the meeting read portfolios from schools other than their own and examine the quality of the evidence provided as explanation for the suggested exceptionality. If there are questions, the reader may ask someone representing the student's school for clarification but most often the portfolio must "speak for itself". Portfolios deemed to represent potential GATE students are passed on to the district program director for final approval. If approved, parents, teachers, and students are informed and site-based GATE programs are instituted. Occasionally, the district screening committee does not find evidence to suggest exceptional performance and teachers are asked to provide additional or more convincing evidence at a later screening. Or even more rarely, teachers are asked to review what constitutes exceptional performance and begin portfolio collections from other students.

Generally, the schools which have portfolios to be screened send one or two members of their site team along with the portfolios. The portfolios are put in a stack, pretty much in the middle of the table, so members from other schools can pull portfolios from schools other than their own. It's a cold reading. They don't know this kid. The portfolio should sell itself. So, the collection of samples should be powerful enough that they speak for the student.

The identification process described by the two case schools closely mirrors the district's vision. Minor differences in process between the two schools are a function of site level experimentation which has led to additional forms or procedures that are designed to assist teachers. For example, Reynolds has institutionalized a home-grown summary sheet or checklist that teachers use to insure they have followed all the necessary steps, and have accumulated the appropriate quality and quantities of material prior to meeting with the site-based screening committee. Reynolds also has added a grade level team meeting for teachers to discuss a student with colleagues prior to the site level screening meeting. This helps the teacher prepare the case and allows grade level colleagues who also know the student to contribute additional anecdotes or classroom artifacts.

As described in the previous quote, Mission has formalized part of the awareness stage by asking teachers at the end of the school year to identify students that subsequent teachers may want to target early the following year.

In general, interviewees at both sites seemed comfortable with the process, though many deemed it time consuming. Several commented that they felt the district process was helpful and much more accurate than traditional methods of identification.

> ***It's a long process and it takes a lot of work, but its a way of determining who is really gifted and who is maybe just a high achiever. You walk a fine line there. Through IQ tests or comprehensive test of basic skills (CTBS) tests, sometimes you can't catch those kids who are gifted in the performing arts. Or in ways those tests don't test.***

In particular, most interviewees felt that their participation in a district screening at the formal identification stage helped them to better understand the process and what to look for and how to document portfolio evidence in the future.

> ***Going to the district level has been where you learn a lot more. You can see what other schools are doing, as well as what they're turning down and why. That has helped us to get insight as to what we need from our teachers.***

> ***Oh wow, the first rule I learned is that more is not necessarily better. And, I learned that the hard way. I brought a couple of portfolios down for district screening. The folders were thick and the students weren't identified. They sent me back with my tail between my legs. And of course, right away, the first day back in September, I was working on getting those two kids qualified. I did it with just one document. I refined it to something that I knew was powerful. You just need something that is very potent and powerful that speaks for itself.***

Who Gets Identified?

As stated above, a major rationale for the portfolio process was to identify students with a wider range of talents beyond academic and intellectual achievements and to insure inclusion of students from varied backgrounds, languages, and ethnic groups. How successful has Oceanside been at meeting these goals?

Types of Exceptionalities. District reports (Montgomery, 1993) indicate that as of October 1993, 68 students had been identified using the portfolio process at the three schools from which ILPs were collected (Reynolds = 41, Mission = 14, Ivey Ranch = 13). ILPs from the 1992-93 and 1993-94 school years were not available for all identified students (ILPs count for each school: Reynolds = 31, Mission = 14, and Ivey Ranch = 8).

Each ILP includes a description of the area(s) of exceptionality or giftedness for the identified student (See format descriptions in ILPs Process section on page 32.). An analysis of the ILPs from the three schools who contributed these documents revealed that the vast majority of students continue to be identified based on academic and intellectual achievement. Table 1 displays the numbers of students for which ILPs were available by school and area of giftedness or type of exceptionality. Across the 53 students, 113 types of exceptionalities or gifted areas were specified. The total number of types of exceptionality exceeds the number of students as most students had been identified in more than one area of giftedness (and/or the ILPs were specified with several areas to aid planning of instructional activities for the student).

As Table 1 indicates, creative and critical thinking ability (which also included strategy use, observation skills, and abstract reasoning), and exceptional intellectual capacity were the most frequently noted areas of giftedness with 21 instances each (79% in total), closely followed by performance in the language arts (reading, writing, communication and expression) (36%). High academic achievement generally stated contributed an additional 23%. Only 29 areas (26%) found on the ILPs were something other than academic or intellectual/thinking ability. In contrast to Oceanside's goals, relatively few students were identified as having leadership or visual and performing arts talents (23%, 13%, 4%, respectively).

Table 1

Types of Exceptionality - Area of Giftedness

School	Year	Intellectual	Creative/ Critical Thinking	Language Arts & Writing	High Academic Achievement	Leadership	Self-Directed Motivation	Math/ Science	Artistic/ Visual/ Spatial	Performing Arts
Reynolds	1993-94	11	17	14	5	6	8	7	5	0
	N=31									
Mission	1992-93	1	1	1	2	1	0	0	1	1
	N=6									
	1993-94	6	2	1	1	2	0	0	1	0
	N=8									
Ivey Ranch	1993-94	3	1	3	4	3	0	0	0	1
	N=8									
Total	N=53	21	21	19	12	12	8	7	7	2

Note: Some students had more than 1 area identified

Representativeness of Students. Oceanside has compiled a database to document how traditional and portfolio identification processes vary according to student ethnicity and other factors including environmentally and economically impacted and second language learning. Table 2 depicts the percentage of students identified for participation in the GATE program by ethnicity and these other factors. Although data suggest an increase in identified students from varying backgrounds using portfolio assessment, minority students are represented below their percentage of the total population. Second language learners (LEP on the chart) are the most drastically underrepresented, despite an increase of seven percentage points using the portfolio strategy.

Table 2

Percentage of Students Identified for Participation in the GATE Program by Ethnicity and Other Factors

Ethnicity	Traditional Measures[1]	Portfolio Assessment [1]	Overall District Population
Asian	5%	8%	3%
Latino	17%	21%	34%
African American	5%	6%	15%
White	71%	56%	41%
Other	2%	9%	7%
Other Factors			
Environmentally Impacted	1%	19%	Unknown
Economically Impacted	3%	21%	54%
LEP	0%	7%	38%

A closer look at the three schools that submitted ILPs reveals more specific patterns of identification and representation for gender, language, and ethnicity (see Table 3). None of the three schools has identified GATE students in proportions representing their schools.

[1] Three year period

Table 3

Representativeness of Identified Students

	Male	Female	LEP	White	African American	Filipino	Hispanic	Asian	Pacific Islander	Native American
[redacted]	≅448	≅448	27	493	135	47	170	25	19	7
School %	≅50%	≅50%	3%	55%	15%	5%	19%	3%	2%	<1%
Gate N = 41	28	13	0	28	3	2	6	2	0	0
Gate %	68%	32%	0	68%	7%	5%	15%	3%	0	0
[redacted]	≅365	≅365	234	102	132	22	424	15	29	7
School %	≅50%	≅50%	32%	14%	18%	3%	58%	2%	4%	<1%
Gate N =14	8	6	4	4	1	0	6	2	2	0
Gate %	57%	43%	29%	29%	7%	0	43%	7%	14%	0
[redacted]	≅370	≅370	74	348	126	15	208	30	7	7
School %	≅50%	≅50%	10%	47%	17%	2%	28%	4%	1%	1%
Gate N = 13	4	9	0	11	0	0	2	0	0	0
Gate %	29%	71%	0	85%	0	0	15%	0	0	0

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As Table 3 indicates, two schools have disproportionate, and contrastive, representation of male and female students. Reynolds has identified more than twice as many male students as female, while Ivey Ranch is the opposite. These statistics warrant further investigation into how teachers at these particular schools are defining giftedness, and what types of evidence of exceptionality are being collected and presented to make a case for inclusion.

In terms of LEP students (See Table 3), of the three schools researched, only Mission has identified students whose primary language is other than English. The other two schools have relatively few LEP students in the schools population, while Mission has established primary language and bilingual instruction programs for its many LEP students. With this expertise in designing programs for LEP students, it is not surprising that Mission has developed strategies for identifying the talents of students and has closely approximated the overall representation of this group in the GATE program.

All three schools have GATE populations that underrepresent students from non-white ethnic groups. Ivey Ranch has the most uneven statistics (school = 47%, GATE = 85%), followed by Reynolds (school = 55%, GATE = 68%). Ivey Ranch has underrepresented groups with relatively high proportions of students, especially those from African American and Hispanic backgrounds. Mission has the most diverse student population and the most even statistics, but is still underrepresented by African-American students. A discussion of why some students continue to be underrepresented follows in the implications section of this report.

> ***My frustration right now is that I know we're not tapping a lot of students we need to. There are some students that we are not getting products from.***

What Constitutes Evidence? The portfolio identification process is primarily dependent on the quality of evidence collected by teachers and others to exemplify the student's talent. Differences in what teachers perceive to be proper evidence and their ability to collect and document it, may play a role in the representation issues described above.

> ***What gets collected in the portfolio would depend on what area of giftedness he had. If the kid was showing great insights into math, you would bring in samples of their math work. Or writing assignments that they had done about math. For one kid that was identified as gifted in music, we had cassette tapes of him playing things he had learned***

by ear. Some pretty intricate pieces. We had to have those assessed by a musician, instead of just a regular council of teachers.

Interview participants from the two case schools described a variety of student products and other artifacts used as evidence of exceptionality. An analysis of these artifacts revealed that most of these products are school assignments -- stories, reports, artwork, math papers, science projects, etc..

Well, basically I think we try to get creative writing in terms of showing a higher level of thinking. We do a lot where they analyze literature or character analysis, so we can see their thought processes. Those types of things.

I had a child that was gifted in art. I just basically collected his daily journal, which he would illustrate. I didn't collect it daily but I screened his daily drawings. He would draw constantly and I picked the ones I thought best represented his talent.

Teachers have become more innovative over time. They now include anecdotal records of conversations with students, or examples from class discussions that reveal a student's ability to go beyond desired outcomes to higher levels of understanding or communication.

We do a lot of anecdotes. I had this one student, the type of kid that when we'd be brainstorming and trying to pull things together, he would be explaining to the kids in his own terms so it would make sense to them. Like he was the facilitator. He'd just take over. The way he could do that, become a leader like that, you know he's very talented. So I tried to end the anecdote that I wrote, narrative that I wrote for him, by giving examples. Specific examples, because there really was no product.

Audio and video tapes are increasingly finding their way into the identification process, particularly for performing arts, but also for collecting oral reading samples and individual performance in a group process.

I'm in the process of building a portfolio now. I am going to make a tape recording of him reading. I'm going to do it with maybe three or four different samples and different types of literature too.

Teachers can also use photographs. I've seen posters, science project type things, and video tapes. We have a child here that was identified in the area of leadership. The way that the identification was made was by showing our site screen team, and the district screen team the video tape of this girl in a group situation.

Parents have also played a role in supplying teachers with evidence of exceptionality through narrative descriptions of the student's early development and functioning. These narratives are primarily anecdotes of the precocious language or activities of preschoolers and commentaries on the student's interests and activities at an early age. For some parents, writing these narratives is an opportunity to boast of a child's ability. For others, it may conflict with cultural norms or, in some cases be a challenge if the home language is other than English. Or, if the parents have not had many educational opportunities themselves.

Challenges to the Identification Process

Representation of Students. Teachers described greater difficulty documenting the performance of students who are not the traditional academic achievers. While it is relatively straightforward to collect work samples, art, or even video and audio tapes of performing arts, it is more difficult to capture talents in the area of leadership. Or, the glimmers of intellectual capability in students who may not have had mainstream life experiences and opportunities.

I'm not sure whether our identification process is even working. We have to find a way, in the specific population that we have to identify exceptionality when its hidden with a lot of other stuff. Because we've got them. It's because of the limited experiences these kids have. Boy, I've been in other schools, and even in this school, GATE kids jump out at you. The ones that are unbelievably GATE. But here it's hard. I don't have the answer. I don't really, but I know that some emphasis has to be put on recognizing minority communities and limited experience children. Kids who haven't been to the beach and it's just half a block away. That's probably the biggest concern and where I think the biggest need is.

A discussion of the inequities in opportunities of some students and implications for redefining giftedness, building teachers' multicultural awareness, and suggested changes in the identification process are presented in the implications section.

Teacher's Attitudes Toward GATE. Teachers selected for the interviews have been actively involved in the portfolio identification process and all seemed comfortable with GATE programs in general. But not all of their colleagues share this enthusiasm. Several of those interviewed remarked that some teachers at their schools are not in favor of GATE programs and feel that offering such programs is elitist. That money spent on these programs would be better spent on programs for students who have "greater needs".

> ***Well, I think that it's tough to do. A lot of the attitudes of teachers that have been around awhile are incorrect towards GATE. I think, they think a lot of times it's academics only. I think it's also the same kind of attitude I had that these kids are going to make it no matter what. Why are we wasting our time? We've got kids that are five years, three years below grade level. That kind of a thing. I think the attitude of the teachers is one thing that we need to address.***

Other teachers feel that the programs they offer students in their individual classrooms are sufficient for all kids and that they offer rich instructional opportunities with plenty of extensions beyond the routine curriculum. Some teachers are concerned that "gifted programs" single students out and may make them or other students uncomfortable.

Additional teacher concerns are related to the time consuming demand of learning a new process for identification and perhaps, changing instructional practices so that "giftedness can show through" and be documented efficiently. Even teachers who have been involved with the process for awhile suggest that it takes time getting into the process of learning how to do it and feel comfortable with the strategies.

> ***I think just getting more experience and becoming more comfortable with it for the longest time it was just kind of this ephemeral procedure. It just wasn't as cut and dry as the old fashioned test. Finally, getting a sense of having a handle on it has made it a lot easier for me. Just getting the experience with it.***

In contrast to the traditional identification process with little teacher involvement other than recommending a student for testing, the new portfolio process requires additional personal commitment from teachers. As described above, taking a portfolio to the site-screening or district-screening committee meeting is like presenting a case in a court of law. The teachers are committed to presenting their

evidence, and are often disappointed and feel they have let the student down when the case is not accepted.

> *Basically, it's kind of a scary process the first time you do it. You feel like it's your judgment on the line. Just because I believe this is a GATE student, I have to go and prove it to my whole grade level team, and to the site GATE team. Then I have to go up and embarrass myself in front of teachers from another school. What if they say no? Then they are saying that I have bad judgment. We had teachers in tears after one GATE meeting.*

As difficult as this personal commitment is, the teachers who were interviewed explained that collecting this evidence and preparing the case assists them in better understanding the student and his/her instructional needs, whether or not the identification is made for GATE.

Parent Involvement. As mentioned above, parents can play an important role in the identification process by working with the teacher to prepare evidence of the exceptionality. Each of the case schools had a different story to tell about parent involvement.

At Reynolds, parents fall into two camps. One group of parents is insistent that their children be identified and receive instructional programs that are more challenging but not necessarily more work. Teachers are sometimes uncomfortable with these parents and feel that they have to do more to please them and re-educate them about new GATE programs.

> *Some parents will say, "Well my child is GATE. Why aren't you doing anything for him? He should be pulled out and doing things like that." They want the old program. So we need to re-educate the parents too. What this portfolio process is doing is re-educating them.*

> *When it comes to dealing with the children I don't feel uncomfortable, but sometimes maybe with the parent. They have certain expectations they may walk in with and you don't know the experiences they may have had in the past. So far all of the parents have been really positive, which has made me feel really good. We feel like we are servicing*

the parents too. They are realizing that, yes, we really do care for the children that happened to be on the higher end of the spectrum.

The other group of parents at Reynolds seems to be resistant to GATE programs, holding some of the same attitudes as resistant teachers, that GATE is elitist. Or that it singles out children, or will result in extra work for the student.

Other parents have been completely turned off with the GATE process. They've experienced it in other Districts, or they have been through the transition Oceanside has gone through. Their attitude is, "Do whatever you want." Some parents have told us, "No, we don't want them put up." They feel that all they'll do is get extra work.

At Mission, parents are less likely to push for inclusion of their children in GATE programs. Many of the parents there are unfamiliar with the program and its possibilities. Though most are enthusiastic about the opportunities the GATE program can provide once the student is identified.

We have a different, definitely a different parent population here. And we have parents who don't necessarily care if their kids are GATE, or even know what it means. I don't want to bad-mouth the parents, but I think they basically don't understand what we are looking for. They know their kid is doing something. Is not your average everyday kid, but they don't know why in general.

Refinements and Revisions Over Time

While the overall portfolio identification process has stayed the same, teacher's familiarity with each stage and their ability to carry them out has changed in several important ways.

It's the process, I really think we are learning. It's like anything else; the more you know, the more you know you don't know.

Teachers report that they are now more comfortable with the documentation procedures necessary to compile the portfolio. Particularly the need to keep careful anecdotal records of student performance, and as a means for adding context to products included in the portfolio.

I just think that anecdotal notes are real important. A lot of people tend to skip over them. They want to get writing samples from students or math work samples. But sometimes, if you just get something that the kid said in class, that shows more of a spark of brilliance than a 20 page term paper that they wrote.

In addition, the use of portfolios in other aspects of assessment in the schools has made collection of student work seem more manageable. Continued staff development in open-ended teaching strategies and differentiated curriculum has also helped to build teacher capacity to implement the portfolio process for GATE. When teachers are using these strategies, the child with potential for exceptional performance has more opportunities to demonstrate his/her abilities.

When teachers first heard about it, it was just really odd, because there was nothing else going on with portfolios. Then more and more we were, in a way, a little ahead of ourselves with this. Now things are catching up to the GATE portfolio process. So now that teachers are more into authentic assessment, portfolio assessment in general. It's much, much easier for them to pull things to put into a GATE portfolio. In addition, the other thing that has started happening and is now taken as a matter of course, is our open-ended type of instruction. It's much easier to get evidence when you're having open-ended discussions or open-ended activities. So, because of the changes in the curriculum in general and the changes in the way we're doing assessments in general, the portfolio process is easier now.

Teacher Recommendations for Future Revision. Throughout the interviews, teachers and other personnel reflected on the current portfolio process and made suggestions for future revision. Some teachers suggested alternatives to paper and pencil documentation of student performance in favor of some live event. One teacher recommended that once the portfolio had been compiled, perhaps the student should be interviewed rather than, or in addition to, having the teacher represent the student with products.

We come to the site team and you really have to prove to someone else that this child is gifted in some area. I found it was hard to explain to someone who hadn't experienced Riley, his giftedness, so sometimes I wish there was an interview process where I could take the kid and say this is my gifted student. What do you think? You see the spark,

but it's not always easy to show through the work that we do in class everyday. To have that spark come across on a piece of paper is difficult. That's why I would like to have an interview. If I could put this kid in the folder and send it up to you, you could talk to him for five minutes and you'd see what I see. But I have to show it to you on a piece of paper. That makes it a bit more difficult.

Another interviewee felt that rejections or returns at the district screening (though rare) could be avoided by more careful scrutiny of the evidence at the school site. She remarked that the school site screening committee may be "over sold" by a teacher they know so well and have so much confidence in. They are in the process of refining the site screening process so that they only see what is in the portfolio not who is bringing it to the meeting.

Teachers remarked about the time consuming nature of the portfolio compilation and the need to meet with grade level teams, school site committees, and district screening committees. In most cases, teachers had release time to attend meetings (often CAC supported), or they were conducted after school within the work day hours. But there was little, or no, compensation for time spent after hours annotating student work samples or writing narratives describing student performance.

I think we have learned that in order to present a GATE portfolio, a teacher needs release time. They need release time to pull the activities together. Release time to talk to their team about how to bring out the gift in this kid, that type of activity. Those are some things we are going to have to work toward. We really need to have more prep time for the teachers because we are asking them to do a lot of work on top of an already power-jam packed day. We are asking a lot.

<u>Part II --Process for Developing Individual Learning Plans (ILPs)</u>

The findings in this section are organized around the following topics: 1) Background and Rational for the ILPs; 2) variation in ILPs format and process; 3) benefits of the ILPs process; and 4) refinements and revision.

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Background and Rationale for the Individual Learning Plans

After the first year of using the Gate portfolio process several key members of the district task force began to discuss follow up steps for identified students. Led by staff at Mission including the SBC, principal, and school psychologist, the district established the ILPs.

> ***The ILPs were school-based attempts to come to grips with the fact that we are now accepting kids in different ways. There is heterogeneity among the populations. How do we cope with that? That was in one school, Mission. A second school was like, "Oh God, these parents are on our backs. We have this heterogeneity. They're not willing to take the standard answers." There is now enough support at the district level, including the deputy superintendent, for this concept. I think that we are going to move, within the year, to this as the preferred mode to work with the parents and kids in program development.***

> ***I think the assessment part of this process came through first. We started appreciating other intelligences or other abilities as being exceptional. That started getting a head of steam under it and all of a sudden there were all these identified kids. People looked around at each other with their hands on their hips and said, "Well now, what do we do with these kids?"***

Modeled after the individual education plan mandated for all students receiving special education, the GATE individual learning plan was designed to provide GATE students with a customized plan for instruction matched to their individual areas of giftedness or exceptionality.

> ***Because they are all different, we want to focus on their individual needs. Much like at the other end of the spectrum. We have special need students who have individual education plans so that their specific needs can be met. We do the same thing at the other end for the Gate students. While they don't need remedial help, they need help to extend their learning, to go further and achieve more. The ILP gives us a chance to look at their specific needs, really hone in on them and design a way to bring out the best in their area.***

While the ILPs have not been mandated as policy by the district, Oceanside has proposed a vision for preparing the ILPs and has encouraged their use through principal meetings and discussions within the GATE task force. The ILPs are developed through a collaborative process among teachers, identified students and their parents, the school psychologist, and the school-site GATE committee headed by the school-based coordinator.

> ***We look at each kid's specific area and try to tailor something to utilize the strengths that he has. To increase their ability in that area. And, also to be able to share that with the class as a whole. Sometimes with the school.***

Once identified, the student's teacher meets with his/her grade level team or the school-site GATE committee and discusses potential instructional activities matched to the identified exceptionality. These activities should extend or differentiate the core grade level curriculum, not replace or add to it.

Following the meeting among school staff, the student and his/her parents hold a discussion with the school-site committee and classroom teacher to discuss the possibilities suggested by this larger group. The student and parents are invited to make additional suggestions or disapprove those suggested by the team.

> ***The GATE Team, the student, the classroom teacher, and hopefully a parent, will sit down and brainstorm. We try to find work that fits in with what they are already doing, so it's not an overload of extra work for them. We want it to be interesting, that's why we have the students there. It's more of an agreement, than an assignment.***

> ***We make those meetings to establish the goals. We come in with last years program to see how that was completed or not completed. We meet with the teacher, the people from the GATE screening committee, the principal, sometimes the psychologist, the student and their parents. We try to draw the parents in for extensions. We want this to be a family thing rather than just a school-based assignment.***

Once a plan has been agreed upon, the site-team types up the recommended instructional objectives on an ILPs form and prepares copies for the student's teacher and parents. Other copies are kept in the student's cumulative record folder and at the district office.

During the remainder of the school year, the classroom teacher assists the student in carrying out the planned activities with support from parents at home. Occasionally, the plan includes some activities that take the student outside the school to observe or interview someone in an occupation of interest, or work with a professional (artist, musician, etc.) with expertise not available at the school.

Late in the school year, or early in the next academic year, the student, parent, teacher and school-site team meet again to review the ILPs, discuss progress on the suggested plan, and make revisions for the upcoming school year.

> ***Riley will work mainly with his classroom teacher because she has the closest contact with him. His mother and his brother, who is also a GATE student, will be in on it also. Just to try and help him do his play. Give him as much support as we can, and stay out of his way. Let him be creative. See how he does. At the end of the school year, he will sit down with his teacher and discuss how it went. What can we do to make it better? Possible things for the next school year that he would like to do. How did he like it?***

Variations in Individual Learning Plans (ILPs) Format and Process

The three schools that submitted ILPs forms for review all used slightly different formats. (Samples from each school are included in Appendix B.)

Common elements found in each school's format included spaces to indicate student and teacher names, area(s) of giftedness, grade level, date of plan, and proposed instructional objectives. Mission's format added an annual goal and a statement of current baseline information related to the gifted area. For example, a student identified in visual art had an annual goal statement, "learn more about art appreciation and elements of drawing", and a current baseline description, "draws extra-ordinarily well."

Ivey Ranch also included the annual goal statement and sketched anticipated performance outcomes that may come about through the instructional objective. For instance, given the instructional objective, "participate on the debate team," the anticipated performance outcome suggests that the student will "learn the intricacies of debate and participate in class/grade level debates". These anticipated outcomes are similar to Reynolds' addition of activities that define how each instructional objective is to be carried out.

Mission and Ivey Ranch also added names of people who are responsible to carry out the objective (i.e., students, parents, teacher, outside resource). In addition, Ivey Ranch included a timeline for completion of each objective.

Reynolds and Mission provided space on the form for reviewing the ILPs objectives at later dates. At Reynolds this space is labeled, "Assessment/Recommendations", and at Mission it is called, "Performance Outcomes."

The process for developing the ILPs varied only slightly across Mission and Reynolds. The minor variations again reflect school level experiments with the process to make it more efficient for teachers. At Reynolds, the initial ILPs instructional activities are brainstormed by grade level teams prior to the meeting with the site-level team. This extra step was added to insure that the activities were well aligned with the core curriculum for that grade level and extensions of previously planned grade level projects (i.e., science fairs, grade level newspapers, talent shows).

Since this was the first year Reynolds has developed ILPs it is not known how they will go about tracking student completion of the suggested activities. After two years of use, Mission has instituted several procedures for reviewing the progress of ILPs completion at their school.

Benefits/Issues of the Individual Learning Plans (ILPs) Process

Teachers at both schools remarked that the collaborative nature of the ILPs process benefited them as classroom teachers. Because the ILPs activities are generated by a team, teachers feel some relief for planning individual programs for a variety of students with different exceptionalities.

The collaborative aspects of the ILPs process is particularly important when the teacher feels he/she does not have expertise in a given area.

> ***A lot of it is also the areas that you might feel you are stronger in. Like, I am not as strong in math as I am in literature or reading, but I can think of extra things to do in literature or reading. I have a really hard time with math because I'm not very strong in that area.***

I can't be an expert at everything. So it was nice to have someone there who could help. Some of the kids were even referred to other teachers on campus that specialize in their area of giftedness. Some of the kids who were really good with computers were sent to work in Mr. W's room, where he has his computer banks. A couple of the kids were even sent to outside agencies to check into programs that they have at Scripps Aquarium or Sea World. Or whatever fits into the child's needs.

In addition, because the ILPs is passed on to teachers over a period of years, teachers at both schools feel that when they get a new student they already have some basis for planning prior to the meeting with the site committee to make revisions for a new year of activities.

The whole idea is that next year this teacher can pass it on to the next teacher. And next year's teacher will automatically have something to work off of right away. They won't have to wait for the new ILPs, which we plan doing yearly, to get the program started. They'll have that to work off of.

Further benefit comes from the accountability the ILPs places on teachers to carry out the plan. Some teachers reported that the collaborative process makes it clear that teachers have the responsibility to fulfill the instructional opportunities and may put pressure on recalcitrant teachers to foot the bill. Interviewed teachers felt that this benefited students and gave parents a means for communicating with teachers when dissatisfied.

From there it's in the parent, the child and the teacher's hands. We, the committee, can monitor to find out how things are going, but we are not the ones that can make things happen. A lot of times if the teacher isn't willing to do it, we put pressure on teachers in a way by having the parent and the child there. Now, the parent knows what to expect. So if its not getting done the parent will end up possibly putting pressure on the teacher. It makes them accountable. Otherwise, it is a way to have a good working relationship with the parent. The child knows what he can do and might even ask.

Interviewees also reported that they appreciate the collaboration with parents in writing the ILPs. The process has promoted better buy-in from parents for the GATE program and has helped to appease

parents who want proof that their child is getting something "different" and more individualized to the student's needs, and not just more of the same assignments.

> *The parents seem to be very appreciative that we are taking this time to spend with their children. They don't want them to be bored, they want them to be challenged. That's the word you like to hear. But at the same time they are saying they want them to be challenged, they are saying, no extra homework. No ten reports instead of five. So we try to put them at ease right away by saying that the goal is not to make more work but create more in-depth projects. And they agree with that.*

Student involvement in the ILPs development is critical if students are to feel ownership and "buy-in" to the plan at a level that will motivate them to engage in the prescribed activities. There is some evidence at both schools that currently students are not as involved as they may need to be to achieve this level of ownership.

> *I think some of the kids think, "Well, this is my task. These are my tasks to do." Or, "These are my goals." And some of the kids think, "I don't really want to do that." It's whether the kid has bought into it or not. I had a kid last year who had to do a thing with rocketry. He drug his heels through the whole spring and finally he got it together. It came off really nice. And, he did a really nice presentation with it and everything. The ILP was fulfilled, but it was a long tough trip.*

While those interviewed praised the level of student involvement in creating the ILPs, the ILPs meetings observed at Reynolds revealed that students could have more say in the planning. In each ILPs meeting, the committee appeared to have the instructional objectives pre-planned and the student and parent just gave their approval. Teachers on the school-site committee did most of the talking and on several occasions interrupted the students. Parents seemed to feel comfortable interjecting their own ideas or commenting on the feasibility, or appealing to a given suggestion, but the parent involvement sometimes took over for the student. In one meeting, a mother apologized for speaking for the student, but then continued to do so.

For the most part students just nodded, shrugged, or smiled in response to suggestions. The number of participants in the meetings, sometimes as many as six or eight adults, including several strangers,

seemed to intimidate most of the youngsters. One student whose mother arrived at the meeting late told her mother that there were too many grown-ups present. Only two or three of the eight students observed seemed comfortable in the large group setting.

The size of the group and other aspects of student involvement in the ILPs planning meeting observed at Reynolds seem to also hold true at Mission. One teacher commented that some students may be intimidated by the group process and may tune-out.

> ***When they are in there with the parents, the teacher and the committee, which is just a room full of people, sometimes its interesting to see how uncomfortable a lot of them are. They're not always listening to what is going on.***

> ***We've had kids, who at the end of the year, hadn't produced it. And we realized that it was our mistake. We'd come up with something for him, I'm thinking of one particular child who agreed with everything. I think he was just afraid of the room full of teachers, and agreed that he wanted to do all the stuff but ended up doing nothing.***

While interviewees recommended that the classroom teacher come prepared with suggested ideas for the ILPs to the GATE-site team meeting, several realized that this process may further alienate students from the process.

> ***When the teacher has actually put down objectives prior to the ILPs meeting, what I'm finding is that that little bit of homework before you go in, where the teacher writes something and throws it out as choices is very good. But then likewise, maybe it somehow changes the twist that it would have taken if the child had had some time to just come up with it on his own.***

While buy-in seems to be the most crucial problem with including students in the ILPs development process, one teacher reported that the ILPs process is difficult with some students who are overcommitted to carrying out any assignment. Though rare, the case of the over-achiever should not be overlooked as it may be more prevalent in some settings. For these cases, the ILPs process may need to be revised so that smaller projects and short-term goals are set and the ILPs are built over time.

Some kids in your class automatically go above and beyond what you want them to do. A student that I have this year, Donald, is a child who wants to do what all the other kids are doing and go beyond at the same time. We have time constraints here, but he doesn't want to miss out on any lesson that is happening in class. He wants to be involved in everything. At the same time, some of the things are just not geared at Donald's level because his thinking skills are above the rest of the class. I'm taxed, while doing the same thing to push it a little further.

At Mission, parent involvement poses additional challenges. As described earlier, some parents are unfamiliar with GATE programs, may have had few educational experiences themselves, or are living in conditions where participating in the school community is difficult. For these families, language differences, lack of transportation, and/or employment demands, may make conditions non-conducive to participating in and supporting the ILPs process from home.

His parents were supposed to evaluate his work. They were to send in his drawing portfolio on a weekly basis but that basically didn't happen because there is less support in the home. It didn't seem like his mother understood what she was expected to do. I mean she did it, but she didn't do any analysis or ask any questions. It's not that unusual here. It's just different because another student is going outside and doing a lot of things on her own. She's got a lot of parent support.

Refinements and Revisions

In its short history the ILPs process has already been refined and the participants have plans for future revisions. Some of these potential revisions have to do with the ILPs development calendar. Aware of the case of the over-achiever (see above) and other difficulties in devising the year-long ILPs, some teachers suggest setting the plan several times each year so it is better aligned with ongoing curriculum planning.

It's hard to take a long term look at what can happen over a school year. So maybe we could have smaller meetings more often and do one thing each trimester. Or have one goal each trimester to work on with the student. When you look at your curriculum, you tend to think about what you are going to be doing next, not for the whole school year. For some teachers, they're in a new grade level. They don't even know what the whole

school year looks like to plan that far ahead. That would be nice, but with thirty-three GATE students at our school, even getting to each student for ten minutes takes a whole day. It needs to be so individualized to meet their needs.

Some recommended that the ILPs process eventually be taken over by the classroom teacher and parents and eliminate the need for the large site level GATE committee meeting. This recommendation may help to alleviate the issues raised earlier of the large group intimidating students, but will require additional time and professional development for all teachers to feel comfortable with the process. And, to insure that all teachers will carry out the process with the same knowledge and expertise that the group often provides.

As with the portfolio identification process, teachers remarked that the only way other teachers outside the committee get comfortable with the process is by doing it with collaborative support from more experienced colleagues. But even with this support, some found it difficult to follow through with the ILPs once planned. Even though parents and students have some responsibility, it is up to the teacher to make sure that the activities are completed. This can pose a problem when class sizes are large and individualized instruction is planned for many students -- GATE or special education. One teacher recommended that someone else at the school be responsible for periodically checking in with the teacher, student, and parents to provide additional resources and to insure that the program is being implemented.

It would be good to have someone else who could casually monitor the progress with the child. Or, be a resource for them for materials, or investigative avenues, stuff like that.

Part III -- Portfolio and Individual Learning Plans (ILPs) Link to Instruction

The findings in this section are organized around the following topics: (1) Value added for instruction; (2) what gets prescribed; (3) impact on instruction for all students; and (4) use of portfolios beyond GATE.

Value Added for Instruction

In olden days, students were given a verbal opposite test by the teacher. If they hit a certain level they were referred for testing. That testing usually took the form of a group aptitude measure. Then a score on that could get them in. A bit lower score, I think it

was two standard deviations above the mean could get them some points toward being in. Also, the normative assessments, CTBS for a long time in this district, certain stanines got you certain points and those went into the formula. And you also got points for ethnicity. Actually it was for being a minority whether you were underrepresented or not. And for socio-economic status, measured by free and reduced lunch and teacher recommendation. So, a bunch of points would go on a piece of paper and if you hit a magic level then you were gifted. You could actually be one standard deviation above the mean in everything, and a couple of standard deviations below the mean in tern come, and you were gifted.

Many of the GATE programs in the past were more like, if you are a GATE student you fit into this mold. It was real specific and it didn't tap into a lot of areas of giftedness that kids can show us. Now we are getting a lot more art and thinking skills, rather than just high academics and test taking skills. We're trying to extend the learning that children are doing by going deeper into the curriculum. We don't want them to miss anything in the basic curriculum. We want to extend what they're learning.

The major reason for developing the portfolio process in Oceanside was to provide evidence of exceptionality not easily tapped by traditional assessments. And to identify students with different backgrounds and talents, but the added benefit of the portfolio and ILPs process is found in planning differentiated, individualized instruction for GATE students. As described below by one of the site-based coordinators, traditional assessments teachers had very little information from which to plan individualized instruction for GATE students. Typically these students were involved in enrichment activities or tracked with other high achievers.

Last year we still had a few students who had been identified by tests. Well, when we come in for the ILPs for our artist, we know we are going to be focusing in the area of art. When we come in to do our ILPs for the student who is a gifted leader, we know we are going to be focusing on leadership. And so on, because we have these portfolios. We see where they were and we can build and build and build. Well, in came this child who had been identified by tests. He was in our school. He'd been in our school the whole time. So it wasn't like someone came from somewhere else. It's just that he was identified early enough in his school career that it predated the portfolio process. It was so hard to

make an ILPs for him. This particular child was rather taciturn. He was very bright but he had no idea of where his area of giftedness was. No one really knew. In a sense it was, "Well, maybe we should make a portfolio for him and see what happens." So, of course we did come up with a learning plan for him by having, the child, his mother, the teacher and the group of advisors work together. We laughed about it. It was interesting because it corroborated for us, validated I should say, this ILPs idea. All the IQ test tells you is 160. Wonderful. But how do you teach 160?

Participants in Oceanside now report that the portfolio and corresponding ILPs provide richer information that allow them to plan instructional opportunities for GATE and other students within a differentiated core curriculum.

What Gets Prescribed?

Here's Riley's ILPs. We try to tap into some of their interests. Some of what they are doing in class. And, their identified areas of excellence. Riley is very creative. His writing is amazingly mature for such a young boy. Riley is writing and producing a play based on 'Star Trek The Next Generation,' his favorite TV show. His job is to find people to play the characters. He has to do everything. He is able to grab other kids who he sees have talent and use their help. Part of what he needs to do is delegate some of the work to someone who is talented in a specific area. We are trying to help him with his interpersonal skills as well. Trying to get some social growth for Riley as well. He needs that.

Here is Shonna's ILPs. (Teacher reads aloud) -- Research five careers. Discover unique requirements of each career and those requirements that are common for all of them. Then, interview people in those careers. Introduce a research method to her classmates. Facilitate other students research and interview the people in those careers. She is going to be a facilitator for the classroom to do these lessons. She is certainly going to serve as the facilitator for school career day for the sixth graders and introduce guest speakers. She is going to write too, in some way related to a community forum. Write about something political, or try to explore topics that could be decided in a community forum speech. A letter to the editor, etc., etc.. We want to try a vehicle for opinions to be

shared. We want her out in the public. Maybe, make a little stretch from just being a leader of the students to a leader in the community. Last year it was things like observe meetings and get familiar with Roberts Rules. Or observe the council meetings of the Jefferson Jr. High and analyze leadership styles.

These two anecdotes describe the instructional objectives found in the individual learning plans of the two students introduced at the beginning of this report. For Riley, who has been identified for extraordinary intellectual potential and high academic achievement, the ILPs promotes his talent in writing, builds on his interest in science fiction, and provides him with opportunities to work with peers to increase much desired social skills. For Shonna, who demonstrates exceptional leadership abilities, the ILPs over the last two years has set the stage for her to learn about different styles and formal processes of leadership and apply them with peers and the larger school community.

We examined the instructional objectives prescribed in the ILPs contributed by the three district schools included in this report. Many of these instructional objectives are well aligned with the type of exceptionality or area of giftedness used to identify students for the GATE program. Examples of well aligned objectives for several types of exceptionalities include:

Leadership

- visit a courtroom and/or personally interview a lawyer
- research and report on the leadership style of a historically significant woman
- be an editor for the sixth grade paper

Intellectual/Academic Achievement

- extend math concepts learned in Polyhedraville
- expand intellectual interests through computer technology
- extend knowledge of Marine Biology
- write and film a play with a small group of students
- make a prototype of a rocket using measurement and geometry
- participate in activities and experiments sponsored by the ECHS science club

Artistic/Music

- practice on (piano) keyboard
- perform in school-wide assemblies
- attend musical performances (symphony, chamber music, opera, etc.)

Artistic/Visual Arts

- develop ability to use various forms of the media
- visit the art museum and prepare a report to share with the class
- have parents review drawing portfolio on a weekly basis and student discuss critical elements

Interviewed staff reported that the ILPs are designed to reflect the individual interests and abilities of the students, but our analysis of the ILPs revealed many inconsistencies in the instructional opportunities prescribed and the type of exceptionality identified. It was not unusual to find the same instructional objective suggested for students with very different areas of giftedness. For example, the objective, "participate in reader's club/novel club" was suggested for three students in three different areas (language arts achievement, intellectual ability, and creative thinking). While it could be argued that this general objective could benefit all academically talented youngsters (or any student), other examples were more contradictory (i.e., assigning "promoting mechanical abilities" for students identified in the areas of language arts achievement and creative thinking ability).

As described by one teacher, the committee approach to the ILPs process has the potential to build an ongoing repertoire of instructional objectives to be used for many students. This handy "arsenal" may however, lead to the overuse of some ideas and cause the teachers to miss out on fresh assignments appropriate for a specific student. This approach may contribute to the limited student involvement problem discussed previously.

The cases of potential mismatch between instructional objective and identified talent tended to occur at the two schools that were writing ILPs for the first time , and were less frequent at Mission where the staff has had two years of experience in the process. In addition, it is difficult to infer from brief ILPs the rich conversation in the ILPs meeting that led to the assignments. It may be that the instructional objectives are more closely aligned with the students' interests, opportunities for collaborative projects in small teams, and aspects of the grade level core curriculum rather than the students' inherent talents. Since the

goal is to provide instruction within the core curriculum differentiated for student interest and ability, these apparent mismatches may not be cause for concern.

> *The outcomes for the ILPs are very different. Riley's is very different, because Riley is very different. It needed to be that way. They tend to work in groups. If there are a group of kids, high achievers that all have the same interests and they're good friends, their ILPs look very much the same. I have these two kids, Jeff and Jim, who are exactly the same. These two could be Siamese twins. They do everything together. Their interests are in the same areas. And, their areas of giftedness are the same. So their two ILPs are identical. Their objective wouldn't have worked for Riley. His had to be different.*

Impact on Instruction for All Students

The identification portfolio and the ILPs development processes provide opportunities for teachers to align instruction with individual student needs. Since a differentiated core curriculum is intended to be the backbone of the GATE program, how do other non-GATE students participate? And what are the effects of the new developments for GATE on the overall instructional programs at participating schools?

Interviewees reported that their participation in the GATE process and for some, on the district GATE task force, has provided benefits beyond working with GATE students. Their comments suggest that is it not only the assessment process that is changing what they do with students, but the professional development and learning opportunities that have led them to rethink what they do instructionally.

> ***Being involved in the GATE Task Force at the district level I've learned different strategies. I hope most people are doing this by turning to open-ended and alternative assessment. All these things are things I've learned through the GATE Task Force. I'm a supporter of all that. In a way I think that it will be much more valuable in evaluating students. Also, in learning to teach and motivate them. This came out of the GATE Task Force and what we all learned working with Elinor Smith.***

For some teachers and other staff, these opportunities to learn has meant applying the GATE assessment philosophy and strategies to planning instruction for all students. Particularly at Mission, where staff have had the most involvement with the district task force and a special education emphasis in planning

individualized instruction. Teachers view the elements of the assessment process as important for all learners and are using them to plan instruction consistent with their inclusion models.

> ***The neat thing for us and the school is that, frankly speaking, we are trying very hard, but our GATE identified students are very few. Still all of these techniques; the portfolio technique, open-ended instruction, thematic instruction, are just what we need for ALL of our diverse learners. Even though, at this school the diversity falls at the other end of the spectrum in greater numbers, it has been extremely valuable for us because it is equally as valid.***

For some less experienced teachers, the GATE ILPs notion of mapping student abilities to instructional objectives has influenced how they think of curriculum planning generally. One teacher remarked that now he is more systematic in planning by mapping lesson level objectives for individuals and groups of students onto larger chunks of the curriculum and state and district guidelines.

> ***I think because we line up the kids' giftedness to specific objectives, that I am more inclined to line up instruction to specific objectives. Like to the framework. Or to our district curriculum guide. Or to what I want to accomplish for my class as a whole.***

The GATE vision for differentiated curriculum has led teachers to rethink how they provide opportunities for all students to extend the core content to the best of each student's ability. For some teachers this means leaving much of the lesson open-ended for those who can extend the learning on their own and scaffolding other aspects so that students of all abilities can participate and contribute. This type of teaching requires a great deal of planning and a willingness on the part of teachers and students to participate in an often delicate balancing act of individual, group, and whole class activities that may be revised on the fly.

> ***I throw in a lesson that is designed to get something out of somebody. You really have to keep your eyes and ears open all the time. There are specific things that you do to tap into different kids. Create a lesson that will be expandable for a kid like Donald to take and fly with, yet still be easy enough for Johnny who reads at a first grade level. That's hard. It's hard to keep Donald going on something he's doing when he needs the personal attention, because he's the only one doing it. He'll come up to talk to me and I'll need to***

be sitting with Johnny, helping him read through the passage. A kind of schizophrenia is happening.

Use of Portfolios Beyond GATE

The portfolio process for identifying students was unfamiliar to Oceanside when it was instituted in the fall of 1991. Few teachers at that time were using portfolios for classroom assessment purposes and for many the concept was not well aligned with classroom, school, and district accountability needs. Over time, the concept of portfolios has found its way into many Oceanside classrooms via the GATE project and other school, district and state efforts. Therefore, the GATE identification process has become a smoother, more efficient endeavor as teachers begin to use portfolios as classroom assessment tools and portfolio cultures emerge in some school settings.

When teachers first heard about it, it was just really odd because there was nothing else going on with portfolios. We were, in a way, a little ahead of ourselves with this. Now things are catching up to the GATE portfolio process. We're into portfolios, even having a Program Quality Review, and we're keeping portfolios based on students work in particular areas. So now that teachers are more into authentic assessment, portfolio assessment in general, it's much, much easier for them to pull things to put into a GATE portfolio.

For some teachers, the only portfolio training they have received has been through the district GATE efforts. The spread of portfolio ideas continues as a process affiliated with the GATE project. The district, in conjunction with consultant Elinor Smith, is currently working with several schools including Mission to institute "multiple intelligences portfolios" for all students. These portfolios bring students into the process to highlight their strengths and areas for potential growth captured in a variety of settings. These portfolios may be used as evidence for creating a GATE portfolio but because they serve other purposes for students the potential disappointment that may arise when students are not identified is avoided. This ongoing use of portfolios for other purposes should improve the GATE identification and ILPs development process in the future.

V. Implications and Recommendations

The final sections of this report define implications for the findings discussed above and place Oceanside's development efforts in the larger context of the CAC. A brief summary of recommendations based on the findings and implications closes the report.

Two intertwined sets of implications emerged from the findings. These include a) issues of equity and fairness in identifying GATE students and involving parents and students in the process; and b) the systemic nature of reform efforts and the need for collaboration within and beyond the district. Each of these sets of issues implies recommendations for building teacher capacity to use assessment and instructional strategies within and beyond the GATE program.

Issues of Equity and Fairness

Implications for equity and fairness were a major theme throughout the findings related to the GATE identification and development and use of the ILPs.

Representation of Students and Parents. In line with district goals to identify minority students, second language learners, and children of poverty, there has been some improvement in representation district-wide, but these groups continue to be underrepresented in some school level GATE programs. In addition, our findings suggest that at some schools males and females are disproportionately represented.

These statistics are common knowledge to the district staff leading the project and they are committed to providing professional development opportunities and ongoing support at the schools to improve the effort. Critical to the ongoing staff development is a clearer understanding of giftedness. The district has expanded the traditional definition of giftedness beyond academic and intellectual achievement to include leadership and artistic talents, and has provided a set of student work samples as exemplars of exceptional performance. The exemplars already available may need to be more widely circulated and annotated with descriptions and a rationale for why they are reasonable, maybe even exceptional, sources of evidence.

These initial steps have not yet provided teachers with enough to capture the "glimmers" of exceptionality in many potential gifted students from varied backgrounds. The "glimmers" are particularly difficult to capture with traditional paper and pencil products. Though the portfolio also can

include video, audio and other types of artifacts the preponderance of examples are of the paper variety. Anecdotal records supplied by parents and teachers provide additional support but as our findings point out, these are not readily available from parents of underrepresented groups. In addition, observing and documenting student performance through anecdotal records is a difficult and time consuming endeavor for teachers who have not practiced this task, or had intensive training in how to integrate classroom observation with suitable instructional strategies. Finally, the kinds of student performance often reported by teachers and parents reflect mainstream notions of verbal intelligence developed through mainstream experiences and opportunities to learn in middle class, suburban, achievement oriented families.

Parents and students are viewed as critical collaborators in the identification and ILPs development processes, but our findings revealed that this involvement could be increased in substantial ways. Parent involvement in identification and ILPs follow up is dependent on their own background experiences and educational level. Supplying written anecdotes and written feedback on ILPs progress may set language and literacy expectations beyond some parents who would like to be involved.

While the district will never be able to rectify all of the social inequities that keep some parents from becoming full participants in the school community, there may be some strategies to promote involvement. Scaffold parent interviews (in the parent's primary language) could be devised in collaboration with researchers or educators experienced with multiculturally and linguistically diverse community involvement efforts. This way all parents could contribute to the GATE identification process and ILPs development.

Student involvement in the ILPs process needs to be increased. There are many ways to modify the ILPs meeting to increase student input and ideas matched to their interests. Reducing the size of the committee should be helpful, but other avenues could bring students into the process as active partners. Older students could meet in grade level teams with one grade level teacher and discuss the upcoming projects and events in the core curriculum. The students (with or without the teacher present) could brainstorm their own ideas for extension and map out their own agendas prior to meeting with the site committee and parents. Alternately, each student could meet individually with his/her classroom teacher prior to the site meeting at which the student presents to parents and committee the ideas they came up with together. A single meeting of the district task force (perhaps with student representation)

on this topic would probably generate many strategies to increase student involvement that schools could adopt or adapt.

Differentiated Curriculum for All? A major tenet of Oceanside's GATE project is that gifted students' needs can be met through a differentiated core curriculum. As the findings noted, teachers feel that the core curriculum they offer is rich enough to support extensions by GATE students with appropriate scaffolding from teachers. The ILPs reviewed as part of this research revealed that many instructional objectives prescribed for GATE students are (with some exceptions) well matched to their needs, but how different are these from what should be made available to all students?

Very few of the instructional objectives found on the ILPs appeared to require advanced ability (except those linked to artistic or leadership talent). Some required a certain motivation or interest in a topic, but most resembled the kinds of activities any parent would want his/her children to engage in. It is not known how many of these activities are viewed by the school as only for GATE identified students who find them on their ILPs, or for all students who are inclined or encouraged to participate in them.

Implementing a differentiated curriculum that truly challenges yet supports all is indeed a challenge for teachers. Ongoing support is required for teachers to plan and experiment with these strategies. Teachers need many examples through "live" observations of colleagues implementing these strategies as well as instructional materials that assist the teacher in planning and following through with teaching. Time for planning and collaborating with other teachers to design instruction is critical.

In addition to concerns related to implementing a differentiated curriculum, the findings reveal a need to insure a wider range of instructional objectives in the ILPs aligned with areas of giftedness. The findings suggest that many of the same instructional activities are assigned across types of exceptionality and some suggested instruction may not be well aligned with a student's particular talents. The ILPs process has only been in existence for a short time, so it is not surprising that these inconsistencies occur. It is likely that they will get better over time, but some recommendations are offered.

First, as has happened informally this year, site teams that are involved in ILPs development could create a network to share ILPs that have been developed. Cross school meetings to share ILPs and discuss individual student cases and student suggested ideas may provide a larger "arsenal" of possibilities. In addition, the district might supply some guidelines for ILPs development that help to create a clearer tie

between identified areas of giftedness and the kinds of instruction suggested. A simple guideline could be a change in ILPs format that adds space to include a brief explanation or rationale for why particular objectives are present on the ILPs. If the district is concerned with the issue of consistency, they may want to create a database and track which schools and or types of exceptionality result in inconsistent ILPs prescriptions and offer professional development accordingly.

GATE Assessment and Systemic Change

As discussed in previous publications of the CAC (e.g., Jamentz, 1993), systemic changes in school structures, teacher and student responsibilities, and community involvement are required if assessment reforms are to improve teaching and learning. Oceanside's GATE portfolio project is no exception. As the findings of this report describe, instituting the new assessment tools has required and facilitated many changes in teachers' roles, parent and student involvement, and district policy. But this work is not finished, and is viewed as an evolving effort in the early stages.

Articulation Beyond the Elementary School. Oceanside's GATE efforts to date have focused almost exclusively at the elementary school level. Except for a few overview workshops on differentiated curriculum and processes for identifying GATE students and occasional connections pushed by school psychologists who serve the full range of students K-12, the middle and high schools have not been involved in the process. Some teachers in the elementary school expressed concern that once students leave their campuses the ILPs process would not continue and students may get lost in the shuffle of the larger, less personalized environments. Other teachers (and parents) have made great efforts to identify students in the late elementary years so that when they move on to junior and senior high school they will be eligible for higher track language arts, math, and science courses.

The district coordinator of the GATE program is deeply concerned about follow through with the ILPs and differentiated curriculum beyond the elementary school, but has explained that until the program is in place at the K-6 level there is little impetus for change at the secondary level. While the philosophy behind the differentiated curriculum and offering individualized instructional programs is highly consistent with state produced task force reports (*Caught in the Middle* and *Second to None*) which describe the latest reforms in curriculum, instruction, and assessment, the district has yet to make many strides in implementing these state level recommendations.

Students who have participated successfully in the new GATE processes in the elementary grades, and their parents, may come to expect the process to continue. Over time the parent community may become a driving force behind GATE reform at the secondary level.

Ongoing Professional Development. As the findings suggest, teachers, school psychologists, parents, and students have taken on new responsibilities as part of the GATE assessment and instruction process. These new roles require new knowledge and expertise, not formerly within the realm of old jobs or at a level not formerly required.

Teachers and administrators are hopeful that this learning is occurring through the assessment development efforts and collaborative inquiry on the part of participants. Opportunities to reflect on progress and identify areas of need for continuing professional development are critical elements of Oceanside's project. Teachers explained that their professional development needs in assessment were viewed as ongoing, not a single workshop to implement a new innovation. If systemic change is to occur in Oceanside, this view of professional development as sustained inquiry will need to be instituted beyond the core GATE task force.

Networking Beyond Oceanside: CAC Involvement. In addition to the ongoing professional development within the district, Oceanside's participation in the CAC has contributed to the project's collaborative inquiry process. The project received about $20,000 in CAC funds over two years to support release time for teachers to meet and develop the GATE identification and ILPs process, and for several district staff members to attend a national assessment conference. According to district leaders, this money could have been acquired from other sources and the release time would have been supported another way, but the CAC's involvement was more valuable than money.

Oceanside took full advantage of the networking provided by the CAC by attending events provided in the Southern and Northern Consortia and sending representatives to the Council of Chief State School Officer (CCSSO) a national assessment conference. The district coordinator stated that the project benefited most from the exchange of expertise and ideas with those who had the broadest vision for what was happening statewide. Formalized events like FWL's research efforts in the CAC's first phase and CAC-wide events such as the statewide conference in October 1993 established relationships with individuals and projects. From these relationships came informal contacts and telephone requests for information that spurred additional conversations with the district task force members and promoted

next step thinking. The pointed questions raised by CAC and FWL staff were viewed as promoting reflection for people who are often bogged down with the day to day effort of working on the project.

CAC's participation required certain deliverables which were perceived as helping Oceanside to "force thinking beyond the local level," increasing their expectations for producing quality work, codifying what they were doing, and reflecting on decisions and processes. State level recognition for the value of local research and development efforts through CAC involvement helped to legitimize the project work in the eyes of some district personnel. Further, the research emphasis of the CAC's involvement was reported to have raised this standard of legitimacy for others.

While Oceanside's CAC involvement will be minimal as the CAC moves into its final phases, Oceanside plans to continue to maintain and extend the relationships that were established over the last few years. These relationships helped to get the project going in its early phases and are viewed as value-added to its ongoing development work. Such relationships may be critical to the systemic changes Oceanside strives to achieve.

VI. Summary of Recommendations

FWL offers the following recommendations for continued refinement of the GATE portfolio project.

GATE Identification Process

Equity issues pose several obstacles for the district goal of increased inclusion of underrepresented groups (LEP, some ethnic groups, and children of poverty). In line with continued efforts in Oceanside, recommendations for building teacher capacity to identify talents in all children include:

- clarify the definition of giftedness by providing exemplars of exceptional performance from students from a variety of backgrounds
- build teacher capacity to observe and document student performance
- monitor patterns of identification at individual schools and work with teachers to identify potential misconceptions and stereotypes of giftedness tied to opportunities to learn, gender, language, ethnicity, culture, student behavior, and economic background

Individual Learning Plans (ILPs) Process

Intended to be a collaborative process among teachers, parents, and students that results in an individualized instructional program, the ILPs process continues to require revisions. Recommendations aligned with district goals include:

- build meaningful opportunities for parents and students to engage in the development and implementation of the ILPs
- institute methods for insuring that the instructional objectives are matched to students' areas of exceptionality and are prescribed consistently across and within schools

District-wide Implementation

The first three years of development work has primarily had its home in volunteer elementary school settings. If the project is to influence programs for gifted and talented students throughout the district, the project philosophy, assessment and instructional strategies will need to spread to the middle and

high schools. The following recommendations sketch key elements of a plan for district-wide implementation:

- continue efforts at the elementary schools with professional development for faculties and principals
- ensure that each elementary school in the district is implementing its GATE programs according to the district vision and guidelines
- promote policy changes in GATE and advanced placement programs beyond the elementary schools
- build teacher capacity at the middle and high school levels to institute differentiated curriculum and corresponding instructional strategies aligned with state level task force reports (*Caught in the Middle* and *Second to None*)

Beyond Oceanside

Oceanside considered involvement in the CAC and networking with its participating pilot projects as beneficial to development work in GATE. Though the CAC is in its final phase of work and pilot projects will no longer be receiving pilot specific technical assistance, the final recommendation is a request for a continued collaboration.

- maintain and extend relationships established within the CAC network (other CAC pilots, CAC and FWL staff, and other collegial connections statewide and nationally)

Final Note

The Oceanside GATE portfolio project strives to become a systemic, district-wide institution.

> ***I marvel because I just gave out two GATE folders today. A teacher wanted them. If this process was something that really didn't make a lot sense, they wouldn't do it. They might try it for a little while but they would soon discard it. I have people coming to me of their own volition. I used to have to do a lot more publicity and selling, and so on. I have people coming to me now. Wanting these folders. Putting in the time to make the assessment happen.***

> ***I would like to say, that I feel very fortunate that I have been involved in this project. Without a doubt, as far as my professional growth, I feel this has been one of the most fulfilling experiences that I have had. Because I have been able to work with people that really care about children. People who really care about the quality of education and where we need to go in the future. It's just been very rewarding. I think that the curriculum, looking at the students work, tells you exactly where you need to go.***

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APPENDIX A

Interview Protocol

Oceanside GATE Portfolio
Interview Script

Opening:

Thank you for agreeing to participate in this interview about your involvement in and perceptions of the GATE portfolio used in Oceanside. I would like to hear about your experiences using portfolios to identify students for the GATE program and how you have been involved in developing and using individual learning plans and GATE portfolios to plan instruction for GATE students.

Your comments will assist FWL and the CAC in understanding how alternative assessment practices are implemented in schools and districts. Your responses are confidential – we will not report your comments with your name without your written permission or inform your district of your personal views.

I see that you have brought some examples or samples to share with me today. Please feel free to refer to them to make your points as concrete as possible.

I would like to audio tape our interview today. Is that alright with you? The tapes will be transcribed and then destroyed so that your anonymity is protected. Do you have any questions at this point?

I. Background and Context for the Portfolio Project

Let's begin with some background questions on the GATE program.

A.
Would you please describe the GATE program in Oceanside?

Prompts (**for teachers, only):
What is the program like at your school?
Who teaches?
How are students assigned to classrooms?

B. **For District Administrators
Prior to the portfolio, how were students identified for GATE?

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**For Classroom Teachers
I understand that prior to the portfolio, students were identified for GATE following teacher recommendation and testing by the school psychologist. Can you tell me about your experiences in this process?

How did you go about planning instruction for GATE students following the former identification process?

Prompt
What kinds of information or evidence was available for you to use?

II. Current GATE Identification Process

Let's move on to the current identification process.

A.
Would you please describe how the portfolio-based GATE identification process occurs?

Prompts
How does the school-site team screening proceed?
Who is involved?
What happens at the review meeting?
When are portfolios submitted to the district review team?
What happens at this meeting?

B.
For administrators
What kinds of evidence of exceptionality are collected by classroom teachers within the portfolios?

For teachers
Based on your experience, what kinds of things do you collect as evidence for the student portfolios?

Prompt
I see that you have a portfolio with you. May I see some samples of evidence?

III. Developing and Using Individual Learning Plans

For administrators
I understand that the district has encouraged teachers and schools to develop individual learning plans for GATE students similar to IEP's mandated for special education students. Would you please describe the district policy and/or philosophy regarding the development and use of ILPs?

For Teachers
A.
I understand that your school is developing individual learning plans for GATE students. What is the purpose of the ILP?

B.
Do you have an example in one of the portfolios with you today?
(pull sample)

How did you go about putting this together?

Is this ILP typical of the others you have developed? Why, or why not?

Did anyone else help you to prepare it? Who and how?

C.
I've been told that one of the goals of the ILP is to provide the classroom teacher with information which can be used to plan students' instructional programs.

Do you find the ILP's useful for this purpose?

Can you give me some specific examples of how you used the ILP for this purpose? (refer to portfolios on hand)

What do you do with the portfolio and the ILP at the end of the school year?

D.
Are you more comfortable using ILP's for some students than others?

If yes -- Which students? Why?

E.
How might the ILP be changed so that it is more useful for you?

IV. Portfolio and ILP Process -- What's good and what needs refining?

For administrators
A.
Since the portfolio process began, what have you learned about the portfolio and ILP process that has led to changes?

What fine-tuning has occurred in the process to make it more efficient and effective for teachers, school-site teams, and the district to identify students, develop ILP's and plan instruction?

What suggestions do you have for further refinements?

For Teachers
A.
Has the portfolio and ILP process affected the way you plan instruction for your whole class?

If so -- How? Would you please describe some examples?

B.
What kind of preparation have you had to collect portfolio evidence, identify students, develop ILP's, and use ILP's?

C.
Now that you have been involved in these processes for some time, what suggestions would you make for revising them?

Closing
Any closing comments or questions for me?

If you don't mind, I would like copies of some of the samples you shared today. I will be contacting you (administrators) / your school based resource teacher (teachers) to make these arrangements.

Thank you very much for your time today.

APPENDIX B

Sample
Individual Learning Plan (ILP)

- Reynolds
- Mission
- Ivey Ranch

REYNOLDS GATE INDIVIDUAL LEARNING PLAN

STUDENT'S NAME: **DATE:** 2/4/94

TEACHER: **GRADE:** 3rd

GATE AREA OF GIFTEDNESS: Abstract reasoning, High academic achievement, self/direction, creativity

INSTRUCTIONAL OBJECTIVES:	ACTIVITIES:	ASSESSMENT/RECOMMENDATIONS:
1. Encourage pursuit of interests in math and science	1. Apply for Palmquist Magnet School for next year	
2. Continue to pursue deep interest in all academic areas	2. Self-motivation-high, ask to do special projects on his own, teach the rest of the class about boas and other animals he researches	
3. Encourage and develop interests in science	3. Dissect owl pellets and recreate animal eaten	

REYNOLDS GATE INDIVIDUAL LEARNING PLAN

STUDENT'S NAME: **DATE:** 2/4/94
TEACHER: **GRADE:** 6th
GATE AREA OF GIFTEDNESS: Self-Motivation, Leadership, Problem Solving, Lang. Arts

INSTRUCTIONAL OBJECTIVES:	ACTIVITIES:	ASSESSMENT/RECOMMENDATIONS:
1. Encourage and develop writing 2. Be an editor for 6th grade paper to enhance writing ability and leadership skills 3. Promote interest and abilities in performing arts and leadership	1. Publish story to be put in library 2. Work regularly on newspaper for remainder of year 3. Choreograph own routine for talent show and finalefor show	

MISSION/BURGENER SCHOOL

G.A.T.E. INDIVIDUAL LEARNING PLAN

ANNUAL GOALS AND OBJECTIVES:

Date: 92/93

Name:

G.A.T.E. Area:	Leadership
Teacher Responsible:	
Annual Goal:	Strengthen leadership/communication skills
Current Baseline:	Advanced level (Adult-like) of facilitating and directing peers- strong motivational skills

Instructional Objectives: 10/22/93	Performance Outcomes: 6/3/93
1. Observe organized meetings. Become familiar with Robert's rules (Student Council Meetings, Jefferson ASB, OHS ASB and other public meetings).	This was done - Student Council, OHS ASB- Robert's rules were observed. Did not attend any other public meetings.
2. Analyze leadership styles and analyze how they are different and how effective they seem to be through visitations.	Observed - Student Council President, U.S.President
3. As a leader of student council Jordonna will be involved in at least two student council activities as a leader.	Double Dutch contest, Valentines Day Dance
4. [redacted] will research New Zealand and then will take leadership in presenting a New Zealand Day in class.	This was done. Taught dances to classmates, invited New Zealander to talk to class and organized New Zealand Day for class. Made costumes with mother's help.
5. Other -	Had lead role in student opera.

Recommendations:

- Wants to run for Student Council President.
- Wants to have more experience with performance.
- Wants to increase her ability in Spanish.

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GATE Individual Learning Plan
(G.I.L.P.)

IVEY RANCH ELEMENTARY SCHOOL
4275 Via Rancho Road
Oceanside, CA. 92057

(619) 967-9720

Student: _____ **Teacher:** _____

Area(s) of Giftedness: intellectual and high achievement

Annual Goal(s): continue improving existing skills and motivate him to excel

Objective:	Anticipated Performance Outcome:	Who:	When:
participate in activities & experiments sponsored by ECHS Science Club	to work with high school students and gain new scientific experiences	Bret Neblett	spring '94
work with Holly Holloway on an individual basis	to work with an ECHS honors science major on independent projects	Bret Holly Neblett	spring '94
investigate visitation to ECHS Science Department and a class	to observe the campus and science class in action	Bret Neblett Parents	spring '94
participate on the debate team	to learn the intricacies of debate and participate in class/grade level debates	Bret Neblett	2-5/94
enjoy family discusssions on books read	to develop a deeper understanding of the author's intent, character development, etc.	Bret Parents	ongoing
have additional time on class computer	to improve computer skills w/ software focused on problem solving & logic	Bret Neblett	ongoing
work on self-directed independent projects	to continue encouraging creativity and growth	Bret Neblett Parents	ongoing

Required Materials: software: science materials & equipment

Date: 1/14/94

SIGNATURES:

Parent(s): _____

Student: _____

Principal: _____ **Teacher:** _____

_____ SCHOOL DISTRICT